



Performance Planning - Business Practices Questionnaire

The following questionnaire, along with the data you have sent to ITRE, will give us a more complete picture of how your transit system operates and a framework for setting goals. These questions will help us assess your current business practices and identify both strong points and areas that need improvement. Please complete the questionnaire and return it to ITRE. Answer to the best of your ability and with as much detail as you can.

Instructions for completing this Questionnaire: To fill out this questionnaire, click on the grey area at the end of the question and begin typing your answer. For questions that are multiple choice, or have you select one option from a list, simply click the box(es) next to the answers you wish to select. You can use the “tab” button to move quickly between the answer fields and copy and paste into these fields if needed. After completing the questionnaire, you will need to save the file and send them to ITRE.

Transit System Information:

Transit System Number: 1
Transit System Name:
Respondent Name(s):
Respondent Position(s):
Contact Phone Number:
Contact Email Address:
Date Questionnaire was completed: 01/01/00

1. Job Advertisements and Employee Information:

1.a. When the most recent new employee was hired, what kind of advertising or help-wanted ads were placed?
Date: 01/01/00
Advertising:

1.b. Please give the job description of one office staff member (scheduler, dispatch, etc) and the job description for drivers:
Office staff:
Driver:

1.c. Please fill out the two “Employee Information Worksheets” with the requested information (See Appendix A). There is one sheet for information about Office Staff, and a separate sheet for Drivers.

2. Organizational Culture:

2.a. Do you have regularly scheduled staff meetings?

2.b. Describe your last staff meeting giving the date, what was discussed and who attended.
Date: 01/01/00
What was discussed?
Who attended?

2.c. On a scale of 1-10, (with 1 being the lowest score and 10 as the highest) how well do you believe your staff works together? Please explain your rating.
Score: 0
Explanation:

2.d. If you are a part of a parent organization give that organizations name:

2.d.1. What is the nature of the relationship between your system and this organization?



	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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3.m.2.If you do carry passengers out of service area, please list the top 2 destinations and the days trips are scheduled:

Destination 1:

Days:

Destination 2:

Days:

3.n. Please check the boxes for the trip purposes you provide service:

Veterans Administration

Medical Trips

Shopping

Vocational Rehab

Educational

Work First

Other Employment

Social

Nutrition

Other (Please list):

4. Operating Policies and Practices: Interagency Coordination, Trip Brokering and Outstationing:

4.a. Does your system coordinate with other systems?

4.a.1. If so, please list the system names and how many trips per month they carry your passengers/you carry theirs.

System Name	Trips/Mo. You Carry Their Passengers	Trips/Mo. They Carry Your Passengers
	0	0
	0	0
	0	0
	0	0

4.a.2.What is your billing agreement for these trips?



- 4.b. Do you broker any trips to taxi companies or outside businesses?
 - 4.b.1. If so, what does the taxi/business charge for this service? \$0.00 per
 - 4.b.2. What is the administrative fee for these trips? \$0.00
- 4.c. Do you outstation any vehicles? If so, why?:
 - 4.c.1. If you have outstationed vehicles, list their base location(s):
- 4.d. What were your total service miles for last Tuesday?
 - Service Miles: 0
 - What is last Tuesday's date? 01/01/00
 - How long did it take to find the service miles?

5. Operating Policies and Practices: Planning and Data Utilization

- 5.a. Describe your system's procedure for service expansion and who is involved with the process.
 - Procedure:
 - Involved?
- 5.b. What planning activities have you engaged in during the past 18 months?
 - 5.b.1. Who was involved in the planning process?
- 5.c. What is your system's mission statement?
- 5.d. What would you like your organization to look like in 5 years?
- 5.e. List any operational or policy changes that have occurred in the past 6 months. Please state the reason(s) for change.

Policy Change	Reason for Policy Change

- 5.f. On a scale of 1-10 (with 1 being the lowest score and 10 as the highest) please rate the importance of efficiency to you AND your governing body and explain your ranking. If there are other items that are more important to you or your governing body, please give those as well.
 - Importance to you: 0
 - Importance to governing body: 0
- 5.g. Give the name or type of reports you run.
 - Daily Reports:
 - Weekly Reports:
 - Monthly Reports:

6. Financial Management: Funding Sources, Rates and Billing

- 6.a. How are billing rates set?
- 6.b. Please list your current billing methods and rates for each funding source.



Funding Source	Billing Method	Rate	Funding Source	Billing Method	Rate
		\$0.00			\$0.00
		\$0.00			\$0.00
		\$0.00			\$0.00
		\$0.00			\$0.00
		\$0.00			\$0.00
		\$0.00			\$0.00

6.c. What is your newest (most recently acquired) funding source?

6.c.1. When was the source acquired? 01/01/00

6.d. Do you renew your funding source contracts annually?

6.d.1. If not, please describe the process you use.

6.e. Which funding source contract/rate was most recently changed?

6.e.1. What prompted this change?

6.f. Do the administrative duties you perform differ between funding sources?

6.g. Which funding source requires the most administrative work?

7. Financial Management: Costs and Extra Charges

7.a. What are your fully allocated costs for the following units?

- Hour: \$0.00
- Mile: \$0.00
- Passenger Trip: \$0.00

7.b. What are your extra administrative fees? \$0.00

7.c. Describe the fuel surcharge in your contracts with funding sources.

7.d. Do you use a rate- setting model of any kind? If so, please provide an example/copy of the last model used and the data you input/output.

7.e. For funding sources that require a local match, how do you generate this match (i.e. fares, donations, local government, etc.)?

7.f. In your accounting process, are your expenses broken down by department code (administrative, operational, etc.)?

7.f.1. Please give the name of the accounting software you use.

7.f.2. Please attach your complete administrative, operational and capital budget for this fiscal year?

8. Passenger/Community Outreach and Advertising:

8.a. If a new passenger was in need of transportation, how would they find out about your system?

8.b. What questions do you ask to determine new passenger eligibility for service?

8.c. Please attach a picture of one of your vehicles.



8.d. What is the url of your website:

